



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 10/28/2004

GAIN Report Number: MO4020

Morocco

Fishery Products

Annual

2004

Approved by:

Michael J. Fay

U.S. Embassy, Rabat, Morocco

Prepared by:

Aziz Abdelali

Report Highlights:

Morocco's squid and cuttlefish catches will be again significantly low for the second consecutive year. The drop has been attributed to low level of fish stocks combined with drastic government measures to limit the catches and preserve the fish resources.

As a result, exports of squid are expected to be significantly lower in 2004 especially because cephalopod stocks carried by exporters are minimal at this time.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Rabat [MO1]
[MO]

Table of Contents

Production 3

Consumption..... 4

Trade..... 4

Policy 5

Production

Octopus continues to dominate Morocco's cephalopod catches (over $\frac{3}{4}$ of the landings) and all government policies aimed to reduce octopus catches influence directly landings of other captured cephalopod species, namely, squids and cuttlefish.

This year, as a result of the drastic measures undertaken by the government to reduce catches of octopus (including the extension of fishing ban from 4 to 8 months) cephalopod landings should be down compared to last year. Sources indicated that high sea trawlers have been unable to fill their quota of allowable catches indicating significantly low fish stocks in the ocean. Contrarily, rowboats filled their reduced quota the first month of the fishing season (see policy section).

The table below provides data on Morocco's cephalopod catch for recent years and forecast for 2004 catch (Quantities in Metric Tons):

Calendar Year	2001	2002	2003	2004 ^(b)
High Sea Cephalopods Catch	79,644	32,019	17,894	12,500
Octopus	46,110	18,964	10,515	8,000
Squid	7,335	2,035	724	500
Cuttlefish	26,199	11,020	6,655	4,000
Coastal Sea Cephalopods Catch	37,180	43,881	20,238	17,700
Octopus	32,380	38,664	18,393	15,000
Squid	2,112	2,755	695	700
Cuttlefish	2,688	2,462	1,150	2,000
Total Calamari	9,447	4,790	1,419	1,200
Total Cuttlefish	28,887	13,482	7,805	6,000
Total Squid & Cuttlefish	38,334	18,272	9,224	7,200
Estimated Squid & Cuttlefish Production (PSD Figures)^(a)			20,000	10,000

Source: Ministry of Fishery, National Fishery Office (ONP)

(a) Include some catches from unregistered rowboats and from fish that does not reach the official government channels. In the PS&D, AgAtt has accordingly adjusted estimates upward for catches to avoid inconsistencies.

(b) Forecast by AgAtt.

Cephalopod fishing in Morocco is done by three categories of fishing boats:

- The deep-sea cephalopod fishing fleet comprises some 290 active trawlers and accounts for two-thirds of cephalopod catches. Their catches include also some white fish that are all exported. These steel boats are relatively modern and equipped with freezing equipment. Catches from these boats are sorted, frozen and pre-packed on board for exports. Deep-sea trawlers stay out to sea for up to three months.
- Coastal fishing fleet comprises some 2,400 wooden boats of which about 400 are potential cephalopod catchers. The coastal boats that are much smaller, more

traditional, and lack refrigeration equipment, which forces them to unload their catches daily. About 95 percent of the catch of these boats are frozen on land for export, the remainder being used directly in the local market.

- Some 2,500 rowboats are licensed in the southern area of Morocco. Catches from these rowboats are frozen inland for export but also sold in the local market. There is however, a great deal of speculation about the actual number of small rowboats that are not registered and that have been encouraged recently by the high prices of octopus. Reportedly, an additional 3,500 rowboats are active and somehow involved in catching cephalopods.

Consumption

Local consumption of squids remains limited because of inadequate distribution channels and the relatively high price of squids. Squids have not been traditionally part of the Moroccan diets and Moroccans have not been big consumers of frozen fish in general. Local demand of cephalopods in Morocco is met by rowboats catches and part of the coastal catches. No promotional activities for squids have been carried out in the local market.

Trade

Exports of cephalopods dropped dramatically reflecting the sharp reduction in cephalopod catches in 2003. The situation is not likely to improve in 2004 as a result of the more stringent fish stocks preservation measures imposed by the government this year. If this situation continues, this is likely to deteriorate further the already weak financial situation of the exporting companies whose income is virtually all from exports. Income from sales of other white fish species is unlikely to offset the drop in earnings from cephalopods.

The table below provides data on Morocco's exports of cephalopods (Metric tons):

Calendar Year	2001	2002	2003
Octopus Exports	67,780	71,527	42,918
Japan	30,141	40,748	19,362
Spain	22,543	16,008	18,850
Italy	9,494	9,385	8,855
Greece	2,626	3,136	3,266
China	976	970	1,242
South Korea	562	461	274
Thailand	961	567	33
Others	476	252	231
Squids (Calamari & Cuttlefish)	33,899	30,148	16,794
Spain	23,833	18,032	11,509
Japan	4,718	6,672	3,504

Italy	3,098	2,818	1,088
Thailand	200	2,265	475
China	53	123	136
Netherlands	25	18	26
France	219	138	21
Portugal	46	36	10
Greece	110	26	4
U.S.A.	105	1	-
Others	1,492	20	21

Source: Official Moroccan Trade Data

Policy

Following the evidence of a sharp drop in fish resources and the scientific report of the National Institute of Fishery Research, the Ministry of Fishery announced drastic measures to restructure and reduce significantly the size of the fishing fleet. On March 24, 2004, the Ministry of Fishery and representatives from various associations (high-sea, coastal, and rowboats) signed a memorandum where several measures were taken to preserve the fish resources:

- Longer fishing ban period: In the past, there were two major fishing ban periods (September-October and March-April). This year the ban was from October 13, 2003 to April 30, 2004 and also during September and October 2004.
- Conversion of cephalopod freezing: There are currently some 90 freezing plants in the southern parts of Morocco that have been purchasing cephalopod and white fish catches and freezing them for exports. The Ministry has been given licenses to existing freezing plants so they shift from cephalopods to pelagic species (mackerel, sardines, and anchovies mostly) to alleviate the pressure on cephalopods sea stocks (octopus mostly). Also, the Government announced more strict control of stocks carried by fish freezing plants in order to reduce poaching.
- The National Institute of Fishery Research will define a quota of maximum allowable catch based on fish resource situation. This year, the government announced much smaller quotas for all three categories of fishing boats compared to previous years:
 - 12,600 MT for high sea fishing boat down from 44,000 MT.
 - 2,200 MT for coastal fishing boats down from 6,000 MT
 - 5,200 MT for rowboats down from 22,000 MT.
 Depending on the power and size of each boat, the government assigned a maximum quota per boat that can be transferable among boats of the same company.
- Increase the minimum mesh size to 70 millimeters for high-sea boats and 60 millimeters for coastal boats. The minimum commercial size for octopus has also been increased.
- The southern fishing zone of Morocco have been mapped out and depending on the type of fishing boats (high-sea or coastal) fishing has been prohibited

in areas that are too close to the coast to allow adequate reproduction of octopus. Also, boats are allowed to fish and market their fish in predetermined areas only.

- Stiffer control on non-licensed rowboats. Encouraging rowboats to specialize in some specific types of fish.

While some measures might be relatively well implemented, others are likely to be more difficult because cephalopod fishing is a source of revenue for several thousands of people in remote villages and the crews of fishing boats.

PSD Table

Country	Morocco						
Commodity	Squid/Cuttlefish						(MT)
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official	Estimate [DA Official]	Estimate [DA Official]	Estimate [DA Official]	Estimate [DA Official]	Estimate [New]	
Market Year Begin	01/2003		01/2004		01/2005		MM/YYYY
Beginning Stocks	452	452	452	1158	552	658	(MT)
Total Production	25000	20000	30000	10000	0	8000	(MT)
Intra-EC Imports	0	0	0	0	0	0	(MT)
Other Imports	0	0	0	0	0	0	(MT)
TOTAL Imports	0	0	0	0	0	0	(MT)
TOTAL SUPPLY	25452	20452	30452	11158	552	8658	(MT)
Intra-EC Exports	0	0	0	0	0	0	(MT)
Other Exports	22500	16794	27400	8000	0	6000	(MT)
TOTAL Exports	22500	16794	27400	8000	0	6000	(MT)
Domestic Consumption	2500	2500	2500	2500	0	2500	(MT)
Other Use/Loss	0	0	0	0	0	0	(MT)
TOTAL Utilization	2500	2500	2500	2500	0	2500	(MT)
Ending Stocks	452	1158	552	658	0	158	(MT)
TOTAL DISTRIBUTION	25452	20452	30452	11158	0	8658	(MT)

Export Trade Matrix

Country Morocco
Commodity Squid/Cuttlefish

Time Period	Cal. Year	Units:	MT
Exports for:	2003		2004
U.S.		U.S.	
Others		Others	
Spain	11509		
Japan	3504		
Italy	1088		
Thailand	475		
China	136		
Total for Others	16712		0
Others not Listed	82		
Grand Total	16794		0